

Pilot Title	Geographic Coordination: Targeting High Energy Users / Underserved Populations	
Opportunity or Problem	<p>The CPUC / IOUs and CSD both administer distinct weatherization programs that benefit low-income residents of the State of California. These programs have differing, but similar income-qualification criteria, and each offer an array of energy efficiency measures designed to reduce the cost of energy to this targeted group, however barriers exist to allowing effective leveraging between the programs which would ultimately benefit the clients. Some of these impediments are catalogued below:</p> <ol style="list-style-type: none"> 1) Differences in intake applications, qualification processes and income guidelines; 2) Diagnostic requirements vary with respect to combustion appliances, blower door and minimum ventilation requirements; 3) Efficiency benefits derived through measures installed under each program are not recognized by the other – credit sharing does not exist; 4) Conflicting weatherization processes cause each program to operate in isolation from the other – typically one program is completed before the other starts – even when the weatherization contractor administers both programs; and 5) Lack of coordination between the programs causes duplication of effort, client inconvenience (two qualification processes / multiple visits) and increased administrative and delivery costs. 	
Goals	<ul style="list-style-type: none"> • Effectively leverage IOU (ESA) and CSD (LIHEAP & DOE WAP) programs to decrease energy usage and by extension costs for low-income Californians. • Target underserved rural customers, specifically those that use non-regulated fuel sources (wood, propane, and heating oil) that cannot be served by the IOU programs and high-energy users for enhanced delivery of energy- efficiency measures. • Provide a single point of contact for streamlined delivery of services to qualified customers. • Reduce overhead, administrative and delivery costs as they relate to service delivery. 	
Key Tasks & Responsibility	<i>Task</i>	<i>Responsibility</i>
	Select 1 – 2 geographic service areas to target CARE high-energy users with coordinated services from dual ESA and CSD providers	CSD & PG&E
	Identify existing barriers between programs	CSD, PG&E & LSPs
	Design a leveraging strategy that will allow installation of a full complement of measures in targeted dwellings	CSD, PG&E & RHA
	Train selected LSPs in use of alternative forms, protocols and new recommended workflow	CSD & LSPs
	Identify target customers and weatherize homes	LSPs
	Assess outcomes relative to 4 goals	CSD, IOUs, LSPs & CPUC
Partners	<p>Project Lead: Chuck Belk, CSD PGE Lead: Frances Thompson Other Partners: Select CSD Local Service Providers (LSPs), CPUC, RHA (Technical Consultant)</p>	
Leveraging	<p>Contribution from CSD (LIHEAP & DOE) T&TA and direct program funds Contribution from ESA Program (ratepayer) funds</p>	
Timeline	December 2012	– Key partners identified (Butte CAA & Fresno EOC)
	January 2013	– CSD & PG&E meet with LSPs to discuss barriers to leveraging
	February 2013	– CSD & RHA request RHA to design a draft leveraging concept/plan
	March - June 2013	– CSD & PG&E review and refine plan – Needed forms, protocols and workflow processes are designed
	July 2013	– New workflow processes are rolled-out to LSPs.
	August 2013 – January 2014	– Customers identified, services scheduled, weatherization is completed
	February 2014	– Pilot complete: 100 homes weatherized (50 in each target area) utilizing new leveraging protocol – Assess success of leveraging concept with respect to identified goals

Pilot Title	IOU/CSD Bulk Purchase Cooperative	
Opportunity or Problem	<p>SCE began the bulk purchase of CFL's and evaporative coolers in the 1980's and now competitively bids the purchase of all program appliances including refrigerators, HVAC equipment, window/wall ac's and other appliances. Through this process SCE is able to purchase appliances at a reasonable cost, set minimum manufacturer specifications, secure extended warranties, and ensure inventory availability throughout its 50,000 square mile service territory. This Cooperative explores the opportunity for CSD Local Service Providers (LSPs) to obtain the same pricing and appliance options available to IOU's through existing IOU purchase orders (P.O.'s). This will allow LSPs to incur costs for only those Measures delivered and will enable better management of program funds and inventory by warehousing Measures to address only their immediate need.</p>	
Goals	<ul style="list-style-type: none"> • Reduce overall costs associated with the purchase of appliances by CSD LSPs • Maintain sufficient inventory of appliances available to LSPs thereby avoiding service disruption • Provide reliable/timely delivery of inventory to LSP warehouses throughout the state • Provide a comprehensive 2-year all parts and labor warranty for all appliances purchased under the P.O. 	
Key Tasks & Responsibility	<i>Task</i>	<i>Responsibility</i>
	Establish inter-agency agreement	CSD, IOUs
	Identify pilot Service Providers	CSD, LSPs
	Establish list of available appliances and forecasts	IOUs, CSD, LSPs
	Communicate and establish P.O. Terms and Conditions to Service Providers	CSD, IOUs, Vendor
	Sign P.O. with Vendor	Vendor, LSPs
Partners	<p>Project Lead: Jack Parkhill, SCE CSD Lead: Chuck Belk PGE Lead: Francis Thompson SCG Lead: Mark Aguirre SDG&E Lead: Sandra Williams Other Partners: CSD LSPs, IOU Vendor</p>	
Leveraging	Existing IOU Purchase Order Terms and Conditions	
Timeline	May 2013	<ul style="list-style-type: none"> – Communicate pilot concept and identify LSPs for participation in pilot – Sign Inter-Agency Agreement
	June/July 2013	<ul style="list-style-type: none"> – Develop forecasts for measures – Negotiate terms and conditions and sign P.O.'s
	August/Sept 2013	<ul style="list-style-type: none"> – Delivery of first shipment of appliances
	September 2013	<ul style="list-style-type: none"> – Delivery of 1st Shipment

Pilot Title	CSD – IOU Datasharing Tool	
Opportunity or Problem	Both the Energy Savings Assistance and LIHEAP/WAP Programs offer comparable services to similar households in overlapping areas. As a result of this overlap resources are sometimes directed by both programs to the same client or customer. At best, this results in the customer receiving all eligible measures and services from each program and at worst it results in duplication of some services and costs. The implementation of a CSD-IOU Datasharing Tool will provide the following opportunities: 1) Minimize the possibility of customers being served by both programs 2) Facilitate leveraging opportunities between the IOUs and CSD 3) Maximize the opportunity for customers to receive all eligible measures and services available through both programs in the most efficient and cost effective manner	
Goals	<ul style="list-style-type: none">• Increase coordination between IOU/CSD and avoid duplication of services• Control cost and promote efficiencies by leveraging taxpayer and ratepayer funds• Provide a statewide database of IOU/CSD treated homes and measures installed• Streamline the customer enrollment process into CSD and IOU programs	
Key Tasks & Responsibility	Task	Responsibility
	Develop customer consent language	CSD, IOUs
	Identify key data fields to be shared between CSD and the IOUs	CSD, IOUs
	Establish inter-agency datasharing service level agreement	CSD, IOUs
	Assess integration of wx data from CSD Database	CSD, IOUs
	Obtain Datasharing Tool Business Requirements	CSD
	Design and develop Datasharing Tool	CSD, IOUs
	Training of Pilot CBOs with datasharing tool/process	CSD, IOUs
	Roll Out of Datasharing Tool to all participants	CSD, IOU
Partners	Project Lead: Jack Parkhill, SCE CSD Lead: Ronn Kaiser PGE Lead: Francis Thompson SCG Lead: Mark Aguirre	SDG&E Lead: Sandra Williams Other Partners: CSD Local Service Providers (LSPs), CPUC
Leveraging	Contribution from ESA Program (ratepayer) Funds Contribution from CSD (taxpayer) Funds	
Timeline	June 2013	– SCE and SCG Datasharing Tool Launch – Demo of SCE/SCG Datasharing Tool to Taskforce
	July 2013	– CSD and IOUs identify data fields to be shared
	October 2013	– Finalize customer consent language to be used by IOUs
	November 2013	– Develop proposal to CPUC for CSD-IOU Datasharing Tool – Determine advice filing or other CPUC regulatory funding vehicle
	May 2014	– CSD and IOU select third party vendor to develop datasharing tool
	June 2014	– CSD and vendor evaluate and assess compatibility of CSD data with existing datasharing tool
	August 2014	– CSD and IOUs work with vendor to gather business requirements
	October 2014	– Review/approval of finalized Requirements Documents by CSD/ IOUs
	November 2014	– Development and testing of datasharing process
	December 2014	– CSD Agencies receive training (classroom, hands-on)
	January 2015	– CSD – IOU Datasharing Tool Launch
	December 2015	- Project assessment report of goals vs. actuals

Pilot Title	1,000 Solar Water Heaters for Low-Income, Single-Family Households	
Opportunity or Problem	<p>Though the CSI low-income thermal program began offering substantial rebates in March, 2012, one year later there have been no single-family applicants for the program. This lack of participation may indicate two key problems with the program:</p> <p>1) low-income families are unable or unwilling to pay the difference between the average cost of SWH (about \$9,000) and the CSI thermal rebate (the highest rebate is currently \$3,750), leaving a \$5,000 - \$6,000 funding gap; and</p> <p>2) the design of the CPUC decision makes it difficult to identify qualifying customers because, in part, it requires ESAP participation data from the IOUs that triggers customer consent issues.</p>	
Goals	<ul style="list-style-type: none"> Decrease gas costs for low-income customers Reduce the installed cost of SWH in California Leverage CSD's LIHEAP funds with IOU rebate dollars Help the IOUs and CPUC achieve their goals of reducing market barriers to SWH adoption, such as high permitting costs, lack of trained installers, lack of consumer knowledge and confidence in SWH technology Significantly increase the size of the SWH market in California 	
Key Tasks & Responsibility	<i>Task</i>	<i>Responsibility</i>
	Examine merits of purchasing standardized SWH units for installation on target dwellings	CSD
	Select single SWH manufacturer	CSD
	Identify qualifying customers/dwellings	IOUs
	Train LSPs to perform installations	CSD
	Assess outcomes relative to 5 goals	CSD, IOUs, CPUC
Partners	<p>Project Lead: Lynn Wiley, CSD PGE Lead: Frances Thompson SCG Lead: Andrew Steinberg SDG&E Lead: Sandra Williams Other Partners: CSD Local Service Providers (LSPs), CPUC</p>	
Leveraging	<p>CSD will contribute approximately \$2 million in LIHEAP funds Program Administrators will contribute approximately \$3 million via rebates (Total project costs assume efficiencies as a result of bulk-purchasing and collaborative efforts.)</p>	
Timeline	December 2012	– Key partners identified
	January 2013	– CSD releases RFI to examine the cost of purchasing SWH in bulk
	February 2013	– CSD and IOUs begin work to identify qualifying customers
	March 2013	– CSD or its agent releases RFP/RFQ to select single SWH manufacturer
		– CSD identifies LSPs interested in participation in pilot
	April 2013	– SWH manufacturer selected
		– CSD and technical consultants begin development of SWH training for LSPs
	May 2013	– Continue working to identify qualifying customers
		– Continue development of SWH training for LSPs
	June 2013	– IOUs contacts potentially qualifying customers or provides CSD with potentially qualifying customer lists
		– CSD Agencies receive training (CSI, classroom, hands-on)
	July 2013	– First CSD Agencies begin assessing and installing SWH
	December 2014	– Pilot complete: 1,000 SWHs installed statewide
		– Initiative assessment report (on success vis-à-vis goals)